

## **Advanced Circulation - Scenarios and exercises**

### ***Library cards***

#### ***Blue cards***

Patron without a library card comes in. Their address is outside your library district but is served by your library through an RB contract. Assign them a blue card so all circulation staff in the consortium understand that they may only borrow materials owned by the issuing library.

#### ***Renewing cards***

**Renewing card at Home Library with old library card** – Patron comes into the library and explains that they already have a library card with your library and shows their key fob. You scan their barcode and their account shows that it is expired. You must ask for an approved ID and verify that the residency has not changed. Then update the expiration date in the patron account if the patron account is in good standing.

**Renewing card at Home Library without old library card** - Patron comes into the library and explains that they already have a library card with your library but they have lost the card. You look up their name in the patron database, pull up the account, replace the barcode and update all other information as long as the patron account is in good standing.

**Resident renewing card at Non-Home Library** - Patron comes into the library and explains that they already have a library card at another Evergreen Indiana library but would like to checkout from your library. You open their account only to find out that their account is expired.

If they are a **resident** and their ID matches the Evergreen Indiana account information and they are in good standing, update the expiration date in their account and put an alert message in their account to notify the patron's home library with the following text: Patron account was updated at [name of staff member's library] on [date].

**Not a Resident renewing card at Non-Home Library** - If they are **not a resident** (non-resident, RB, student), they must return to their home library to update their account.

#### ***Linking cards***

A parent comes in to register their child for a library card. You will want to link the cards to indicate who has signed for fiscal responsibility for the library card on behalf of the minor.

#### ***Linking card during registration***

You can either do this while you are registering the parent by filling in the child's information, clicking on Save and Clone in the patron registration screen, filling in the parent's information, clicking on Is Group Lead Account, and saving the parent's record.

- 1) Charlie Brown and Snoopy Dogg come into the library and want to apply for a library cards where Snoopy Dogg is Charlie Brown's dependent.
- 2) Create an account for Charlie Brown making him the Group Lead Account.
- 3) Save and Clone the account.
- 4) Create an account for Snoopy Dogg and Save.
- 5) Open up Charlie Brown's account, go to Other in the upper right-hand corner and open the Group Member Details screen.
- 6) You should see Snoopy Dogg listed there as Charlie Brown's linked account.

### ***Linking cards after registration***

You can do it after you have already created the accounts by opening either of the account you want to link, going to Other in the upper right-hand corner and opening the Group Member Details screen. From here you can go to Choose an Action, click on Move another Patron to this Patron Group and scan the patron's barcode that you want to add to the group.

- 1) Charlie Brown comes into the library with his wife Peppermint Patty. Your library usually tries to link those individuals who live in the same household and so you want to link Charlie Brown and Peppermint Patty.
- 2) Open up Charlie Brown's account.
- 3) Open up a new tab and search for Peppermint Patty. Once you have her barcode number, go back to Charlie Brown's account.
- 4) In Charlie Brown's account, go to Other > Group Member Details > Choose an Action > Move another Patron to this Patron Group and paste Peppermint Patty's barcode number in the dialog box.

## **Patron management**

### ***Patron search limiting***

You have a patron come in and tell you that they have a card at another EI library but they have lost it. If you search for the patron's first and last name in the patron database and receive too many results, enter the city that they last lived in to narrow your results.

Also, each library is assigned Circ1, LocalAdmin, and Cat2 staff usernames. If you have lost track of any of your staff usernames or PIN numbers, search for them in the patron database. Enter the city your library is located in and choose the staff permission type for which you are searching in the Filter by Permission Profile. Open the profile as you would with a patron to reset the PIN number or update the account.

- 1) Search for your organization's localadmin account.

- 2) Enter the city in which your library is located in the City field.
- 3) Choose LocalAdmin from the Filter by Permission Profile field.

### ***Merging patrons***

Merging patrons becomes very important when new libraries join the consortium. The new EI library may be bringing duplicate patron records with different borrowing privileges into the EI patron database. Merging a record will maintain all of the patron's billing history rather than deleting one of the accounts which will cause you to lose any patron history.

Scenario: Reciprocal Borrower A has Library A as their home library and Resident B has Library B as their home library. Library B is an Evergreen Indiana library and Library A is not. Library A joins Evergreen Indiana and staff members there see that the patron has two accounts. Patron A no longer needs the RB account at Library A because they are a resident at Library B. Staff members at Library A need to fill out the merge patron request form to have the two accounts merged.

## **Item Management**

### ***Circulating vs. Owning library***

Because one of the goals of Evergreen Indiana is to allow patrons to borrow materials from participating libraries, there are two different (sometimes overlapping) types of lending institutions in the consortium: **circulating** libraries and **owning** libraries.

It is important to be able to identify the difference between the two types since the Evergreen Indiana Circulation Policy allows different permissions to each type of library:

**Circulating** libraries are the libraries where items have been checked out. **Circulating** libraries may:

- Receive the circulation count.
- Collect or forgive overdue fines.

**Owning** libraries are the libraries that own the item. **Owning** libraries may:

- Mark the item lost, damaged or claims returned in the system.
- Collect or forgive lost and damaged fees.

### ***Example***

Patron A of Library A places a hold on an item from Library B.

Library B pulls the item and transits it to Library A.

Library A checks it out to Patron A.

In this situation, Library B is the **owning** library and Library A is the **circulating** library.

As is stated above, an item may only be marked lost, damaged, or claims returned by the **owning** library. In order to mark an item lost, damaged or claims returned, library staff must first identify who the owning and circulating library are. In the Checkin, Patron record and Item Status screens of Evergreen 2.1, go to the column picker and choose Checkout/Renew library (**Circulating** library) and Owning library (**Owning** library). The corresponding library will appear in these columns.

A library staff member at the **circulating** library must inform the **owning** library that the item has been reported as Lost, Damaged or Claims Returned through **one or more** of the suggestions below and the item must be transited back to the owning library:

- Consulting the circulation support contact list and calling the **owning** library.
- Consulting the circulation support contact list and emailing the **owning** library.
- Setting an item alert with the staff member's initials and the date.
- Physical note tucked into the item's pages with the staff member's initials and the date along with a description of the situation.

### ***Claims Returned***

Charlie Brown comes into the library and explains that he has an item still on his account which he claims he returned the previous week. You need to identify whether you can mark the item claims returned or not depending on which library owns the item. If your library is listed as the owning library, you may mark the item claims returned. It will display in the catalog as Checked Out so other patrons are aware that it is currently unavailable. If your library is listed as the checkout/renew library, you must inform the owning library that the patron claimed to return the item and they will mark the item as claims returned. Both libraries should begin looking for the item.

### ***Lost books***

**The owning library must mark the item Lost.**

**Scenario 1:** Peppermint Patty has reported to the Circulating Library that she lost an item. Circulation staff at the Circulating Library inform the Owning Library that the patron has lost their item and the Owning Library marks the item as Lost.

### ***Paying for a lost item***

**Scenario 2:** Peppermint Patty would like to pay for the item at the Circulating Library. If the library is not one of the six Payment Pilot libraries, they are not currently provided with an automated mechanism for paying out funds that they have collected on behalf of another library. They may choose whether or not to accept payment from the patron. If they accept payment, they must notify the patron that the consortium policy prevents the library from giving a refund on the lost item payment if the item is found and returned to the library. They then deposit the payment into their

Evergreen Indiana Fund and write a check to the Owning Library. If they choose not to accept the payment, they must inform the patron that the patron should contact the Owning Library to settle their account.

**It is a local decision for each library as to what they will do with *Lost items that are returned and associated Lost fees*. Lost fines and fees will not be automatically deleted from the patron account upon checkin of a lost item.**

**Scenario 3:** Peppermint Patty has a book checked out longer than 45 days and the item automatically becomes Lost. The patron returns the item to the Circulating Library. When the item is checked in, a dialog box pops up notifying staff members that the item was marked Lost. Staff should override that dialog box and transit the item back to the Owning Library. The Owning Library will also receive a dialog box notifying them that the item has been marked Lost. The Owning Library may then forgive Lost fees if they choose.

### ***Item Status/Alternative View***

Uses (collection development/weeding)

## **Fines/Fees**

Overdue fees are due to the Circulating Library. Lost and Damaged fees are due to the Owning Library. Miscellaneous fees are due to the library that creates the billing. Currently, there are 6 libraries involved in a payment pilot and are allowed to accept fines and fees on behalf of all libraries. These six libraries are provided with automatic daily reconciliation reports of the total fees they accepted on behalf of another Evergreen Indiana library. They receive an invoice for the total owed which they pay out to the Indiana State Library. After they pay out what they have collected, they receive from ISL what has been collected for them. Other libraries outside the payment pilot having taken in a payment which is owed to another Evergreen Indiana library should deposit that money into their Evergreen Indiana Fund and then write a check to the owed library.

## **Bookmobile training**

### ***Offline mode***

If the system goes down, your local internet becomes unavailable or we have a system upgrade, you will want to use offline mode. The recommendation is to print out the documentation and follow it step-by-step.

### ***Bookmobile tips and tricks***

-Be aware that checking in items with Amnesty Mode will ensure that no fines are charged on any of the items.

-Use an alias for each bus stop and apply it to the patron's record. Then do a search in the patron search screen for that particular alias if you need to retrieve all patrons associated with a particular stop.